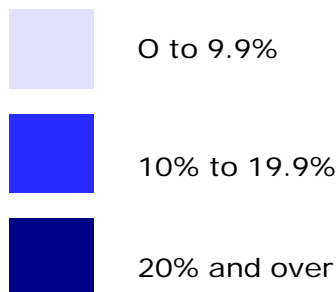
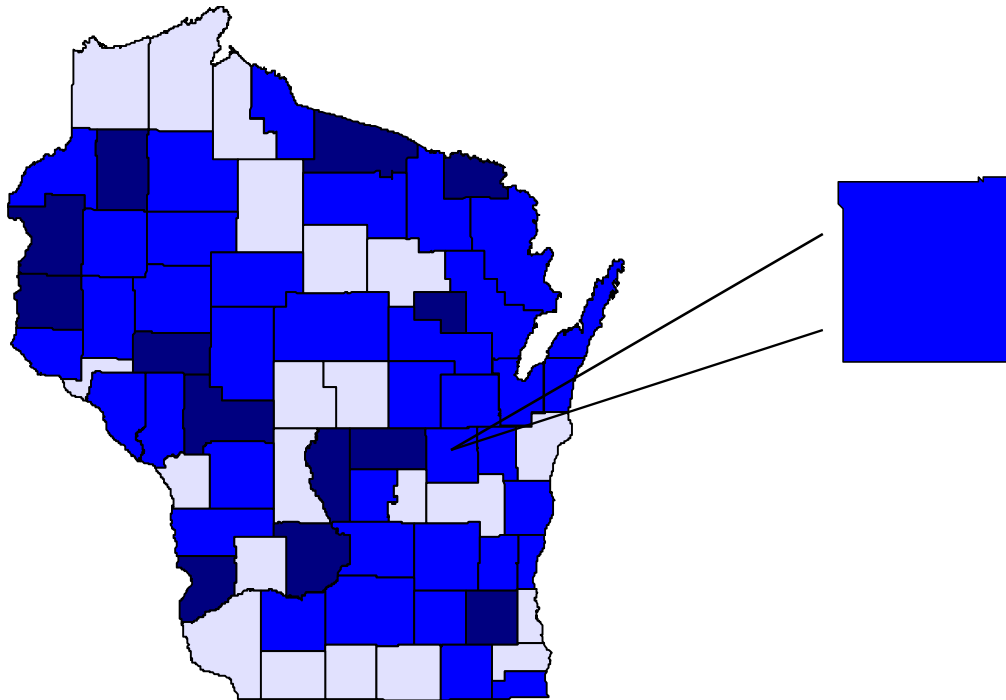


Winnebago County Workforce Profile

Job Growth 1994 to 1999



Wisconsin Department of Workforce Development
Division of Workforce Solutions
Bureau of Workforce Information
October 2001



State of Wisconsin
Department of Workforce Development

Introduction

The County Workforce Profile has been developed by the Wisconsin Department of Workforce Development's (DWD) Bureau of Workforce Information (BWI) to provide a broad overview of Winnebago County's labor market. The data included in this fourth year of publication is for 1999 to maintain consistency with the previous publications and to provide the user with a single year of reference in order to draw comparisons and form a picture of related labor force and employment information.

A variety of economic and demographic labor market information have been provided to describe the current labor market conditions in the counties and regions of Wisconsin. That information includes 1999 data on population, labor force, industries, employment, wages and income. The narrative describes how local conditions have changed over one-year and five-year intervals. Although population information is available from the 2000 census, it is not included in this publication since the period of time selected for all data sets is 1999. For more recent releases of information please consult the Wisconsin Department of Workforce Development Labor Market Information website: <http://www.dwd.state.wi.us/lmi>.

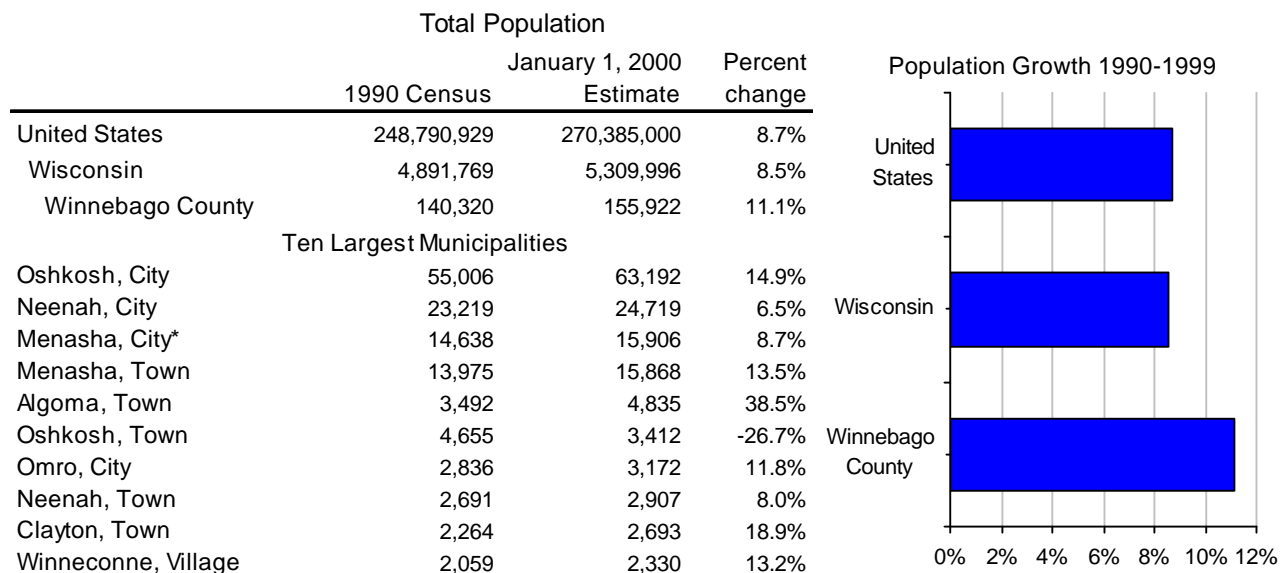
For more detailed information or clarification, please contact your local labor market analyst,
Dan Curtin, by telephone (920-232-6270) or email (curtid@dwd.state.wi.us).

DWD is an equal opportunity service provider. If you need assistance to access services or material in an alternate format, please contact the analyst listed above.

Winnebago County Population and Civilian Labor Force

Winnebago County's population has increased 11.1 percent between the 1990 census and the 2000 estimates of the population. Winnebago County has grown faster than both Wisconsin and the United States. This faster growth rate in Winnebago County is the result of more people moving into the county than moving out of the it. This pattern reflects a positive net migration. Winnebago County's population also increased by having more births than deaths. This component of population change is called natural gain.

The City of Oshkosh is an area with large population growth and economic activity. It is home to the University of Wisconsin-Oshkosh as well as the Experimental Aircraft Association (EAA), and it is located on the interstate 41 corridor, which offers easy access to shopping, business, lodging, recreation, and services.



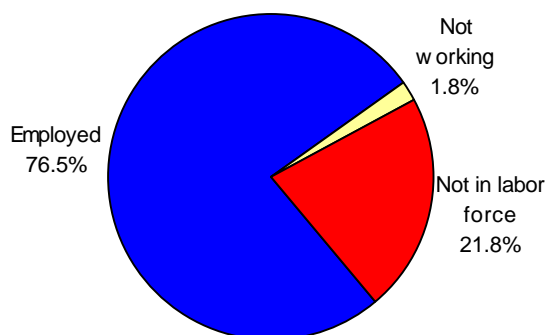
* Winnebago County portion only

Source: WI Dept. of Admin., Demographic Services Center, *Official Population Estimates*, January 1, 2000

The labor force is the sum of employed and unemployed persons who are 16 years old and older. (Readers should bear in mind that many people who are not working are not included in the Bureau of Labor Statistics definition of unemployed. People who choose not to work, or have become discouraged and stopped looking for work, are not included.)

While Winnebago County's population has increased by 11.1 percent since 1990, the labor force has increased by only 1.0 percent. A larger portion of the resident population is 16 and older. Consequently, a larger portion of the population is now available for and in the labor force at a time the job market is growing. The result, of course, is a labor shortage.

1999 Labor Force Participation



The term used to describe the relationship between the labor force and population is the participation rate. Winnebago County has a somewhat larger participation rate than does the State of Wisconsin and the United States.

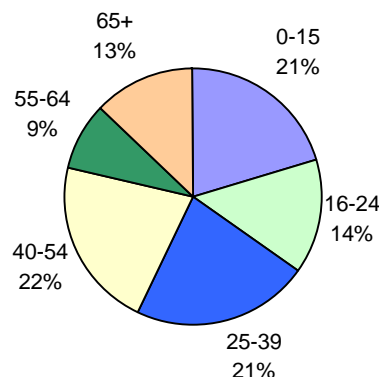
Winnebago County's labor force participation rate is 78.2 percent. The United State's participation rate is 67.1 percent, while the state's rate is 72.3 percent. Participation rates are often partly the result of the economic conditions of an area and partly the result of the demographic conditions of an area.

Source: Estimated from WI Dept of Administration population estimates, Jan 2000, US Census Bureau, and Local Area Unemployment Statistics

The 45.5 percent increase in labor force aged population between the ages of 40 and 54 is the result of the aging of baby-boomers. Of major significance to employers has been the small growth in the number of younger workers. The 5.4 percent increase in the number of 16 to 24 year olds, and an increase in the number of businesses which traditionally hire large numbers of young workers, has contributed to the current labor shortage.

Winnebago County Labor Force Age Population Distribution

Age Group	Population		Percent change
	1990 Census	1999 Estimate	
0-15	30,669	32,113	4.7%
16-24	20,994	22,137	5.4%
25-39	35,553	34,373	-3.3%
40-54	23,393	34,028	45.5%
55-64	11,690	13,398	14.6%
65+	18,021	19,872	10.3%



Source: Estimated from WI Dept of Admin, Demographic Services Center, Official Population Projections 1990-2020 and US Census Bureau

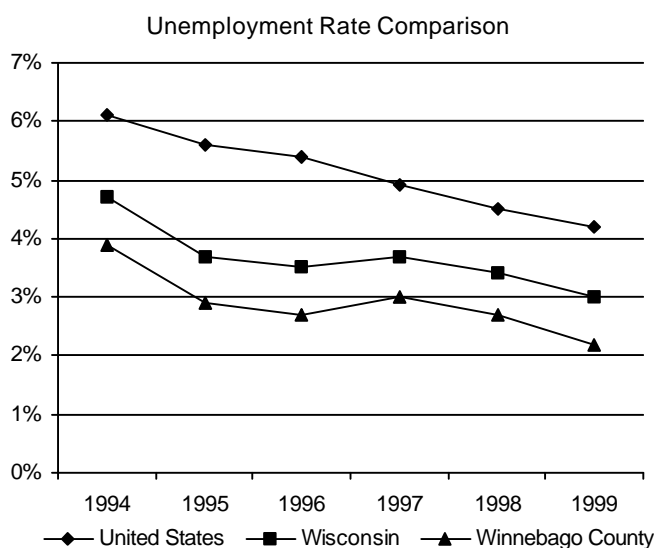
Winnebago County Civilian Labor Force Data

	1994	1995	1996	1997	1998	1999
Labor Force	92,800	93,900	96,800	96,900	96,400	93,700
Employed	89,200	91,200	94,200	94,000	93,800	91,600
Unemployed	3,640	2,750	2,620	2,870	2,610	2,100
Unemployment Rate	3.9%	2.9%	2.7%	3.0%	2.7%	2.2%

Source: WI DWD, Bureau of Workforce Information, Local Area Unemployment Statistics

In the past five years, the number of nonfarm jobs in Winnebago County has increased from 81,810 to 92,334 (based on place of work), an increase of 10,524. In the same period, the number of people in Winnebago County who identify themselves as employed (place of residence data) has grown from 89,200 to 91,600, an increase of 2,400. This seeming anomaly is accounted for by the fact that there are many multiple job holders in the place of work numbers, while place of residence data counts only workers.

There is a lot of cross county travel between the Fox Cities, which are partly in Winnebago, Outagamie, and Calumet Counties. Higher job growth rates than the state and nation have consistently resulted in lower levels of unemployment in Winnebago county.



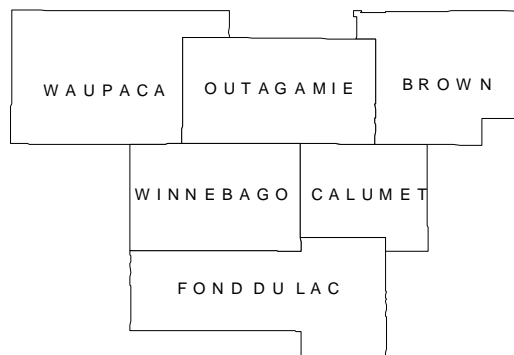
Source: WI DWD, Bureau of Workforce Information, Local Area Unemployment Statistics

Winnebago County Commuting Patterns

	Commute Into	Commute From	Net Commute
Outagamie County	8,942	11,413	2,471
Fond du Lac County	1,316	1,925	609
Waupaca County	351	931	580
Calumet County	375	2,622	2,247
Elsewhere	2,168	3,604	1,436
Total	13,092	21,238	8,146

Work in Winnebago Co 56,317

Source: WI DWD, BWI. Wisconsin's Commuting Patterns, 1994.

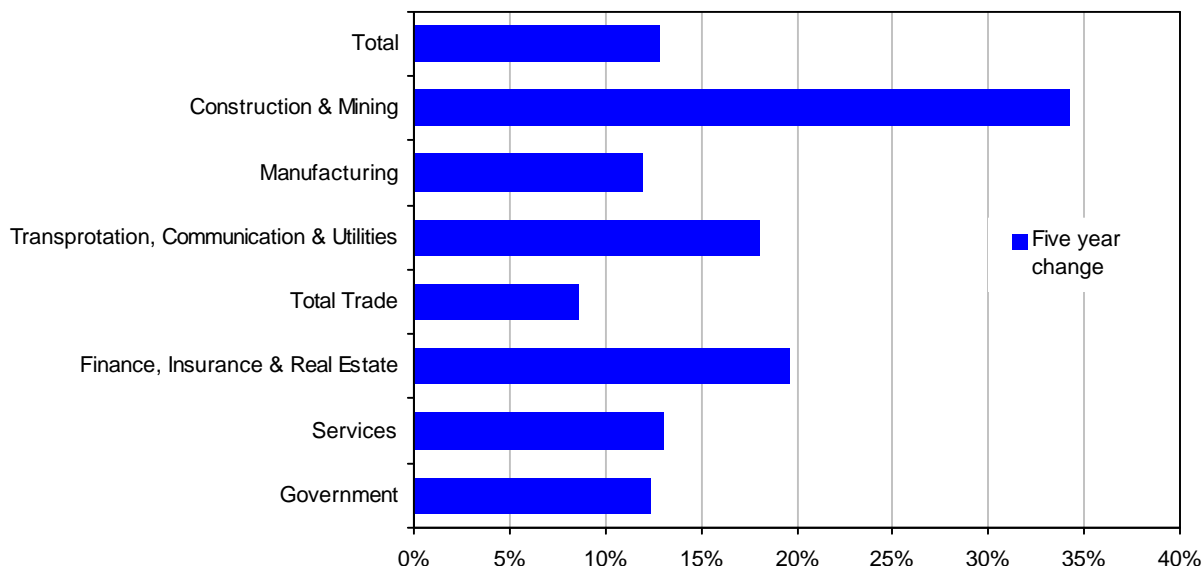


Winnebago County workers are very mobile. Of the 94,200 residents of the county who have jobs, 40.2 percent (37,883) work outside of the county. The largest number commute to jobs in Outagamie County, and that is mostly within the Fox Cities area. Winnebago County actually gains 2,471 workers in the exchange with Outagamie County. A large part of this inter-county commute around the Fox Cities relates to jobs in the paper industry.

Commuters get around Winnebago County via Highway 41, the main corridor running through the heart of the Fox Valley. The 441 express way makes the commute for over 2,500 from Calumet County to Winnebago County much easier than at any time before completion of that route. It also affords faster access from the Green Bay area.

Commuters to Winnebago County come from a 16 county area. They travel from Oconto County in the north, Portage County to the west, Columbia County to the southwest, Door County to the northeast, Sheboygan, Manitowoc, and Calumet Counties to the east and Fond du Lac to the south of the area. Outbound commuters travel to seven other counties, but most of the traffic is to Outagamie and Fond du Lac counties. While most commuters are manufacturing workers, in recent years we have seen an increase in professional and technical workers expanding their commuting areas for work. From the Fox Cities to Oshkosh is one of the state's hottest job growth areas.

Winnebago County Employment Change by Industry 1994 to 1999



	1994	1995	1996	1997	1998	1999	Percent change	
							1 year	5 year
Total	81,810	84,583	84,492	85,978	90,625	92,334	1.9%	12.9%
Goods Producing	33,618	34,596	34,896	35,427	38,050	38,296	0.6%	13.9%
Construction & Mining	3,094	3,337	3,497	3,657	3,767	4,153	10.2%	34.2%
Manufacturing	30,524	31,260	31,399	31,770	34,283	34,143	-0.4%	11.9%
Durable	11,429	11,706	11,622	11,959	12,094	12,267	1.4%	7.3%
Nondurable	19,095	19,553	19,777	19,812	22,189	21,876	-1.4%	14.6%
Service Producing	48,192	49,986	49,595	50,551	52,575	54,037	2.8%	12.1%
Transportation, Communications & Utilities	3,162	3,157	3,089	3,207	3,572	3,734	4.5%	18.1%
Total Trade	15,199	15,795	15,095	15,215	15,563	16,495	6.0%	8.5%
Wholesale	2,438	2,808	2,598	2,814	3,081	3,296	7.0%	35.2%
Retail	12,761	12,987	12,497	12,401	12,482	13,199	5.7%	3.4%
Finance, Insurance, and Real Estate	2,423	2,706	2,708	2,750	2,813	2,898	3.0%	19.6%
Services & Misc.	17,782	18,564	18,782	19,176	20,071	20,102	0.2%	13.0%
Total Government	9,625	9,764	9,922	10,204	10,556	10,809	2.4%	12.3%

Source: WI DWD, Bureau of Workforce Information, Nonfarm Wage & Salary estimates.

Nonfarm wage and salary employment measures the number of jobs within a county excluding agricultural, military, and self-employed workers. This data measures the number of jobs within the county without consideration of where the job-holder lives. Thus, this information is often referred to as "place of work" data. Winnebago County has a large number of residents who commute outside of the county to their jobs; this is the most significant reason why the labor force in Winnebago County was 2,100 larger than the number of jobs within the county during 1999.

Industrial parks and shopping malls adjacent to the Highway 41 corridor have contributed strongly to job growth from one end of the county to the other. Manufacturing industries, while not being the creators of most job growth in the county, still account for 37.0 percent of the nonfarm jobs. Service; transportation, communications, and utilities; and construction industries have all demonstrated high percentages of job growth. That is consistent with population and economic growth in Winnebago County. The more than 34 percent growth rate in construction industry employment is clear evidence of solid economic growth in the county. Construction is most noticeable in the rebuilding of much of the county's infrastructure, but commercial and housing growth are doing well, too.

Winnebago County's Largest Industries and Employers

Top 10 Industry Groups

Industry Group	March 2000		Numerical Change	
	Employers	Employment	1 Year	5 Years
Paper And Allied Products	37	12,313	-193	39
Health Services	215	8,223	-35	-370
Educational Services	12	5,012	97	522
Eating And Drinking Places	227	4,963	-46	323
Printing And Publishing	43	4,101	-152	-236
Business Services	132	3,835	361	1204
Transportation Equipment	14	3,690	100	641
Rubber And Misc. Plastics Products	13	2,845	-114	1989
Electronic & Other Electric Equipment	7	2,818	136	148
Social Services	76	2,645	146	659

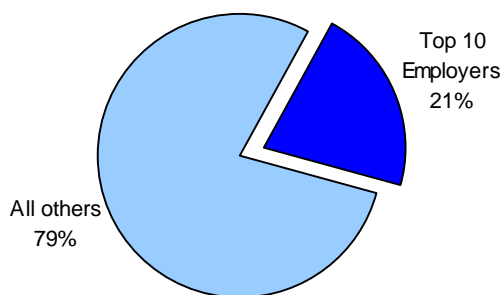
*data suppressed to maintain confidentiality

Top 10 Employers

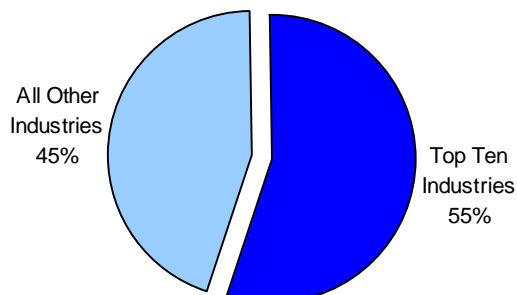
Company	Product or Service	Size
Kimberlyclark Corp	Paper & Paper Products	1000+
Plexus Corp	Electronic Components	1000+
Curwood Inc	Plastic film for packaging	1000+
Oshkosh Public School	Public School System	1000+
University Of Wisconsin Oshkosh	Public University System	1000+
Pierce Mfg Inc	Utility & Emergency Vehicles	1000+
Network Health System Inc	Health Care System	1000+
Thedacare Inc	Health Care Services	1000+
Oshkosh Truck Corp	Truck Manufacturing	1000+
County Of Winnebago	County Government Services	1000+

Source: WI DWD, Bureau of Workforce Information Bureau, ES-202 file tape, 1st quarter 1999 and LMI benchmark 2000.

Top 10 Employers Share of Nonfarm Employment



Top 10 Industry Groups Share of Nonfarm Employment



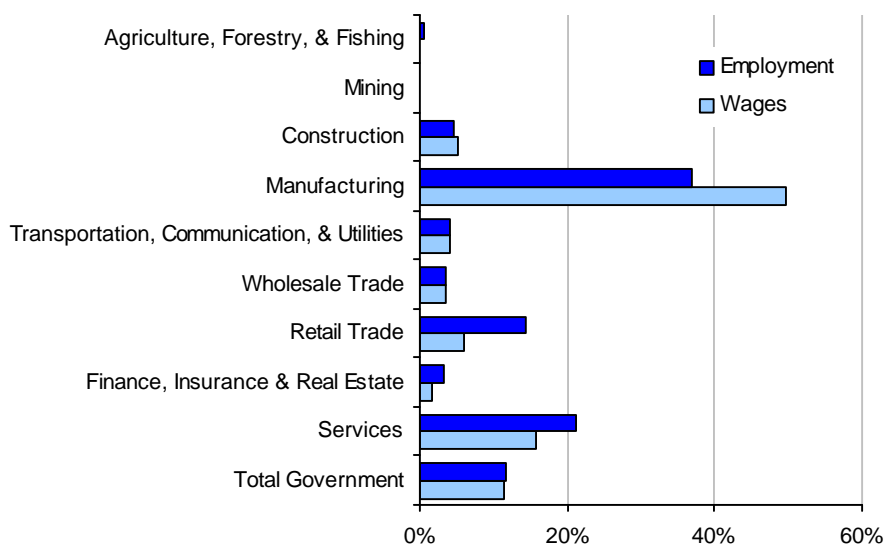
There were a total of 3,674 employers in Winnebago County at the end of 1999. The top ten private sector employers employed 21 percent of all nonfarm workers working in Winnebago County. Five of the ten largest employers can be found in the manufacturing industry. Five of the ten largest industry groups are also in manufacturing.

Paper and allied products is the largest industry within Winnebago County. Kimberly Clark, Wisconsin Tissue, James River, American National Can, U.S Tissue, and P. H. Gladtfelter are the major companies producing paper and paper consumer products in the county.

Winnebago County Employment and Wages 1999

	Annual Average Wage	State Average Wage	Percent of State Average	Percent change 1 year	Percent change 5 year	Number of Workers
All Industries	\$32,728	\$29,609	110.5%	4.6%	25.8%	88,610
Agriculture, Forestry, & Fishing	\$17,446	\$21,499	81.1%	3.3%	18.8%	457
Mining	*	\$39,968	*	*	*	*
Construction	\$37,203	\$36,772	101.2%	1.5%	23.4%	3,985
Manufacturing	\$43,953	\$37,773	116.4%	5.8%	25.5%	32,763
Transportation, Communications, & Utilities	\$32,238	\$34,523	93.4%	6.3%	25.1%	3,583
Wholesale Trade	\$31,629	\$38,048	83.1%	-1.0%	14.5%	3,163
Retail Trade	\$13,511	\$15,066	89.7%	2.2%	23.8%	12,665
Finance, Insurance, & Real estate	\$17,077	\$37,911	45.0%	-50.9%	-25.3%	2,781
Services	\$24,171	\$26,041	92.8%	2.2%	21.0%	18,832
Total Government	\$31,870	\$32,017	99.5%	1.3%	14.3%	10,372

Total Employment and Wage Distribution by Industry Division



Source: WI DWD, Bureau of Workforce Information, *Employment, Wages and Taxes Due covered by Wisconsin's U.C. Law, Tables 209-211*.

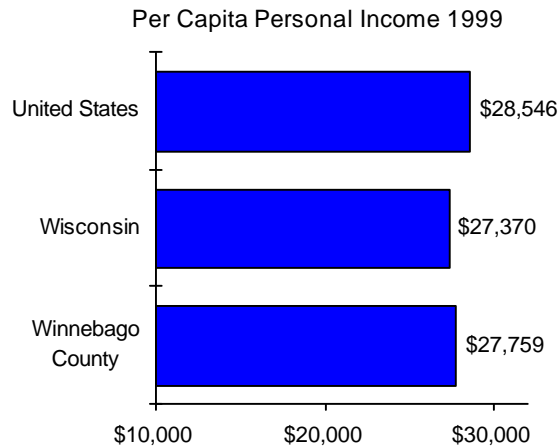
Note: The data from Employment and Wages Covered by Wisconsin's Unemployment Insurance law differs from the nonfarm wage and salary estimates because: 1) multi-location employers report all workers and wages at a single site, such as retail stores; 2) Not all employers are covered by the Unemployment Insurance law and are, therefore, not included in this data series, i.e. railroads, and parochial schools.

The greatest positive differential in average wages between Winnebago County and statewide levels occurred within manufacturing. Manufacturing annual average wages in Winnebago County 1998 were 116.4 percent of the state average. The primary reason for that difference is the predominance of the paper industry and machine manufacturing industries with their high wages for hourly employees.

Manufacturing employment represents 37.0 percent of total employment but 49.6 percent of wages paid in Winnebago County. Some of the differential can be attributed to several large employers which have collective bargaining agreements. Overtime wages also influence the total earnings of manufacturing workers.

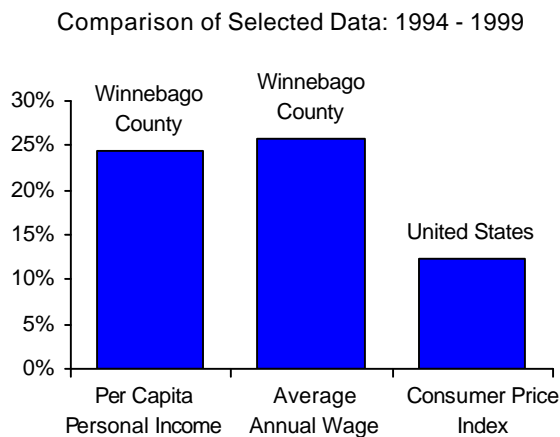
Retail trade employment represents 14.3 percent of employment, yet only 6.1 percent of the wages paid in Winnebago County. The wages in the retail industry represent a significantly smaller proportion of total wages than employment, because the industry employs a large number of entry-level workers and over 40 percent of the employment is part-time.

Winnebago County Wage and Income Data



Per capita income is total income divided by the total number of residents. Income includes wages earned, dividends from investments, and transfer payments from the government. Winnebago County's per capita income ranked 12th highest of Wisconsin's 72 counties during 1999. Per capita income in Winnebago during this period was 1.4 percent higher than the state's but 2.8 percent lower than the nation's.

Over the past five years, Winnebago County per capita income has increased by 24.4 percent and wages earned in Winnebago County have increased by 25.8 percent. A probable reason for the larger increase in average personal income than in per capita income is the large number of Winnebago County residents who work in jobs in the paper industry as well as technical jobs and skilled trades. Skilled and technical worker wages have escalated as a result of the tight labor supply, as well as the result of collectively bargained pay increases in our larger manufacturing industries.



	Per Capita Personal Income						Percent Change	
	1994	1995	1996	1997	1998	1999	1 year	5 year
United States	\$22,581	\$23,562	\$24,651	\$25,874	\$27,321	\$28,546	4.5%	26.4%
Wisconsin	\$21,699	\$22,573	\$23,554	\$24,791	\$26,227	\$27,370	4.4%	26.1%
Winnebago County	\$22,308	\$23,299	\$24,165	\$25,126	\$26,825	\$27,759	3.5%	24.4%

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, Regional Economic Information System.

Selected Occupational Wage Data		
	Mean	Median
Accountant	\$ 18.29	\$ 16.58
Bartender	\$ 7.44	\$ 7.59
Cashier	\$ 7.47	\$ 7.16
Construction Laborer	\$ 12.60	\$ 12.71
Cook, Restaurant	\$ 8.36	\$ 8.11
Customer Service Representative	\$ 14.02	\$ 13.43
Human Resource Manager	\$ 22.68	\$ 22.85
Janitors & Cleaners	\$ 8.46	\$ 7.94
Mechanical Engineer	\$ 24.56	\$ 23.41
Millwright	\$ 20.34	\$ 19.62
Nursing Aide	\$ 9.52	\$ 9.51
Office Clerk, General	\$ 10.23	\$ 10.10
Paper Goods Machine Tenders	\$ 14.72	\$ 14.83
Retail Sales Person	\$ 9.04	\$ 7.46
Word Processors & Typists	\$ 10.52	\$ 10.43

Source: DWD, BWI, 1999 OES wage survey Appleton/Oshkosh/Neenah

Wages paid for work within a county can impact the type of goods and services which may be purchased. Examining wage structures can be an important part of the hiring process for both job seekers and employers.

The mean wage is the sum of all wages divided by the number of wage earners; this is often referred to as an "average". The median wage is the midpoint of all wages; there are exactly the same number of wage earners above and below this wage. If the mean and median are relatively close the labor market for that particular worker is probably tight or very competitive. If the median is significantly below the mean, an employer offering mean wages should capture most of the market. Manufacturing wages in this county are higher than those of the state as a whole due to the large number of union workers.